eTariff Basics

How to create tariffs, revisions and tariff filings

eTariff is work-in-progress. Window appearance, functionality, menu choices and locations are constantly changing. If something has changed, look around the window and try right-click at logical focus points.   If not sure, experiment. Experiments should not cause software errors. If they do, please document and notify etariff@ferc.gov .

Assumptions

- **eTariff is installed and in communication with FERC**
  - **If a regulated company, registered and received PIN**
- **User familiar with tariffs**
- **User familiar with FERC tariff filings**
- **User familiar with FERC procedures**

Tariff Data Format

- **Tariffs are a Data Base**

- **NOT a text document**

- **Example data set for every tariff section**
  - **Company name**
  - **Docket number**
  - **Proposed effective date**
  - **Superceded tariff section**
  - **Filing type**

- **Tariff section "content"**
  - **Accepts most copied text**
  - **Editable within eTariff**
  - **Limited format capabilities**
  - **Accepts many copied formats such as graphics**
  - **Will not accept pasted files**

First-time

- **1st time users must establish an empty data base file**
  - **Retrieve company list**
  - **Select company**
  - **Choose file location**
  - **Enter PIN**
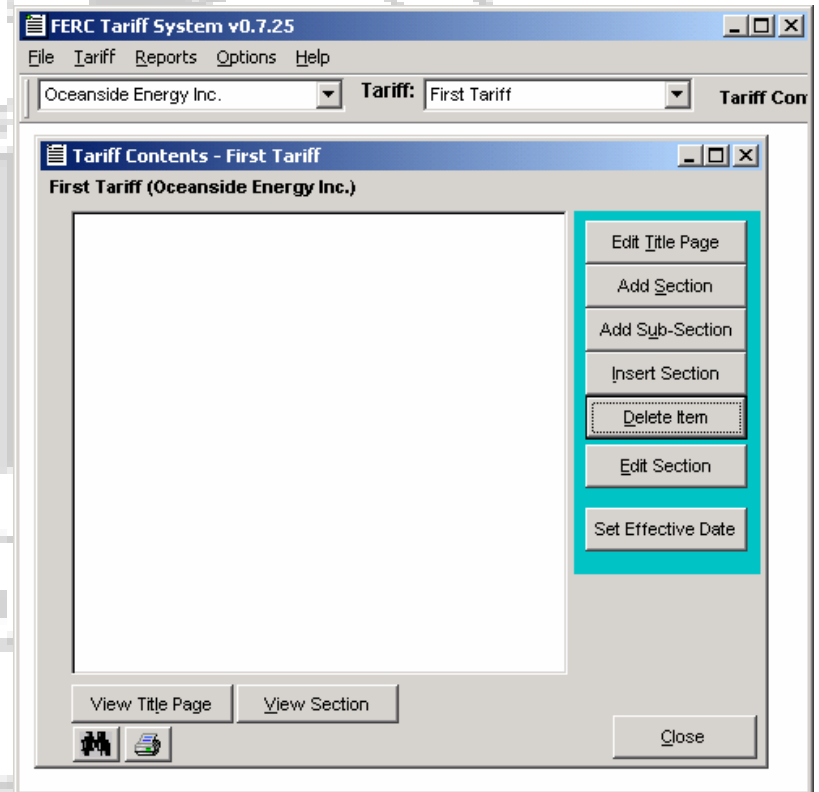 - **Download and Finish**

Create Tariff

- **Create a tariff**
  - **Drop menu from Options**
  - **Note Rename and Delete options**
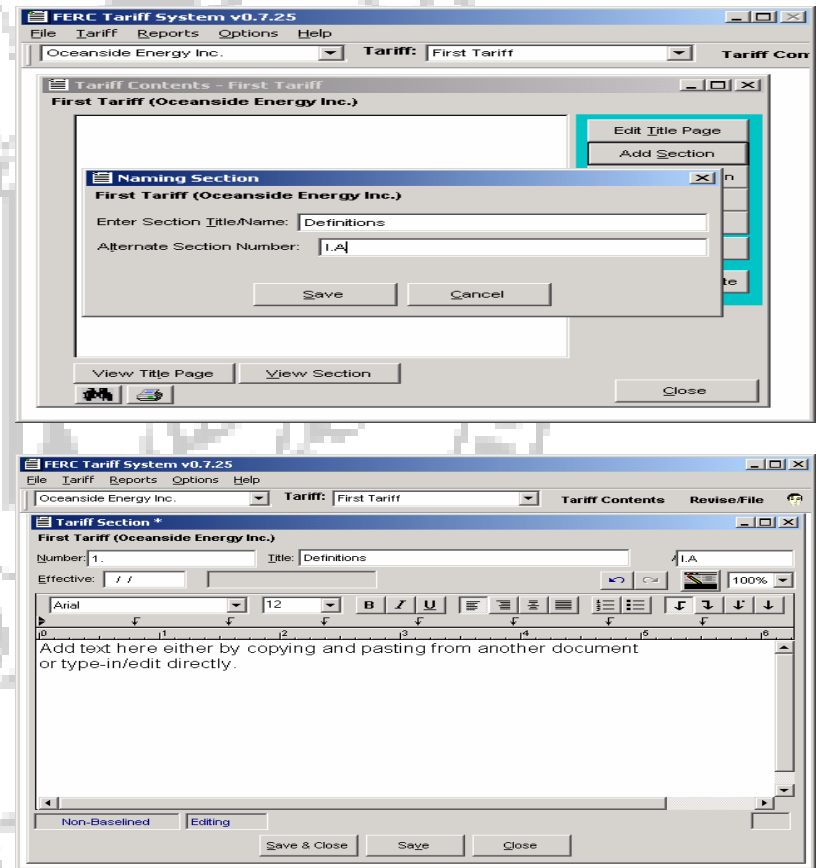
- **Name tariff**

- **Fill in Contact Info**
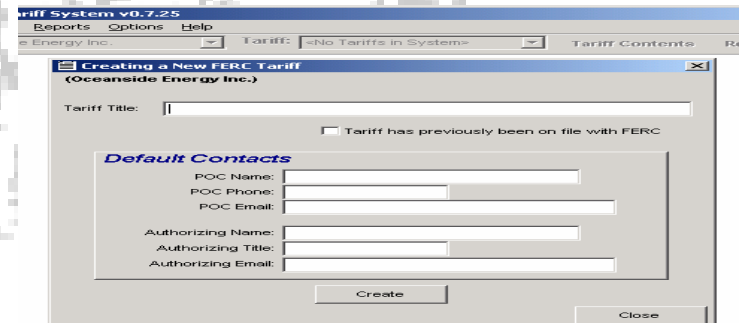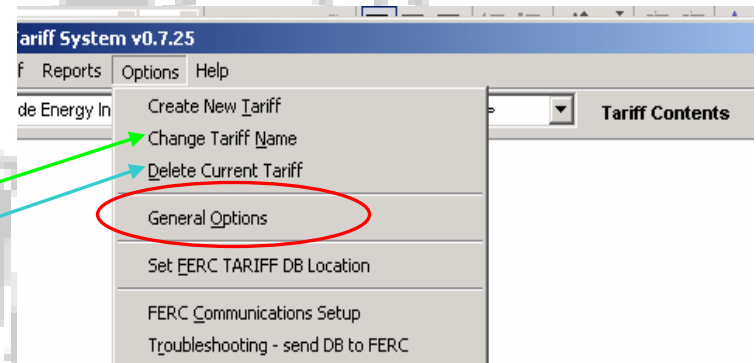
Add Content to Tariff

- **From the Menu Bar**
  - **Select Tariff**
  - **Open Tariff Contents**

Create Tariff Section - Direct

- **Click Add Section**
- **Fill in Section Title, Tariff Section Numbering if any**
- **Save**
- **Paste in or type tariff text**
- **Save & Close**

Create Tariff Section - Copy

- **If a tariff already exists in the FERC public data base [or your own], copy it**

- **Find company, choose tariff, Download, and Finish. Note downloaded file name and location.**

Create Tariff Section - Copy

- **From File, select Import, find imported file and rename**
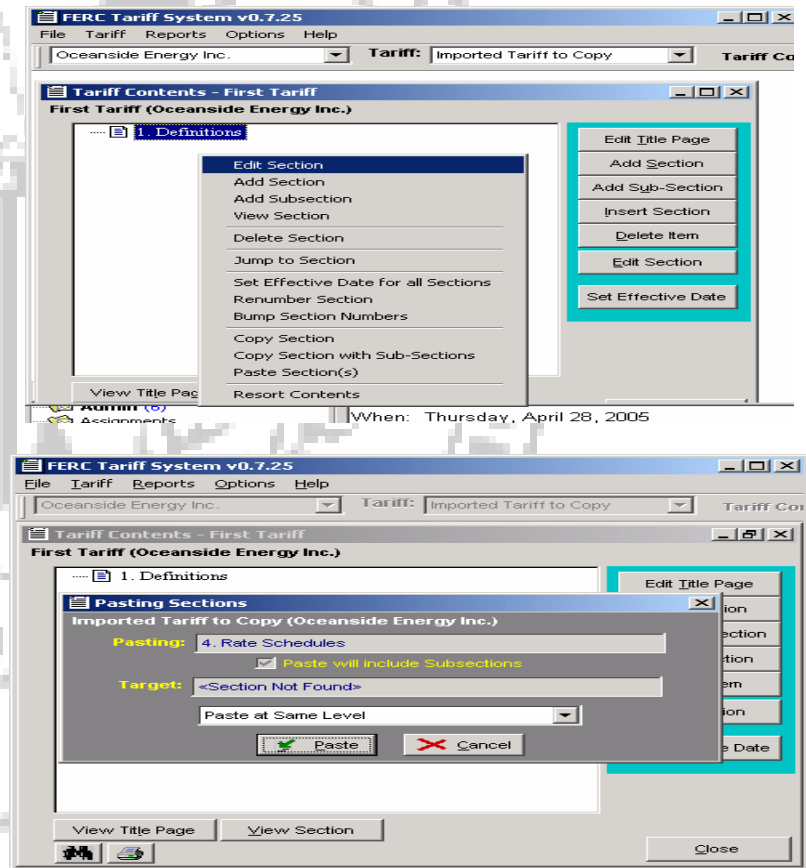
- **Copied tariff now available from menu bar**
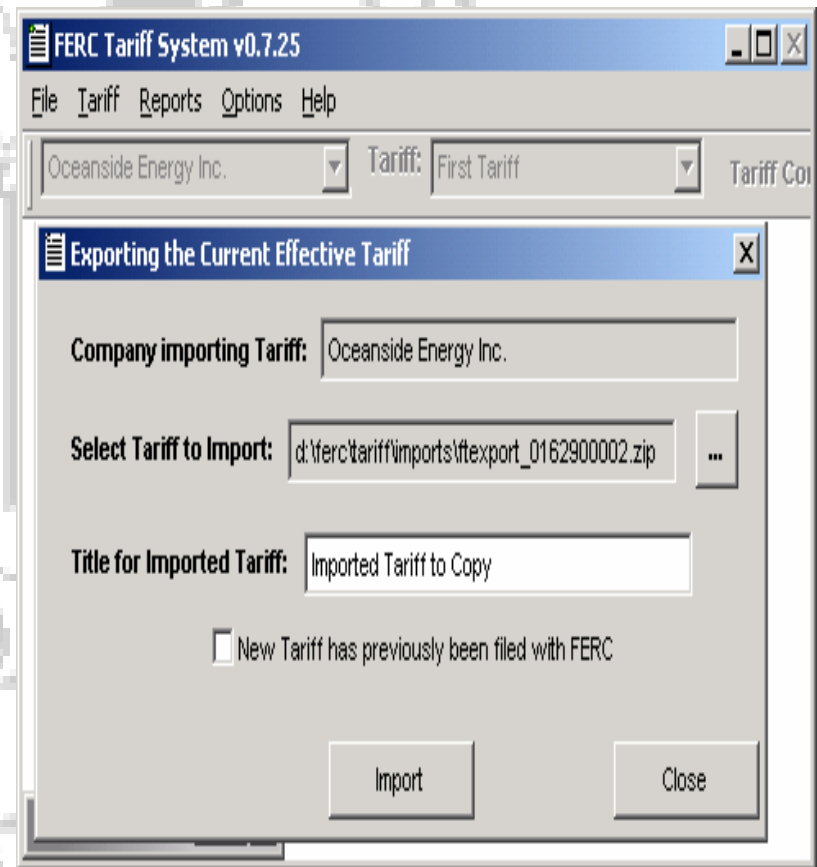
Create Tariff Section - Copy

- **Target section(s)**


- **Right click**
  - **Copy Section (with Sub-Sections) as appropriate**
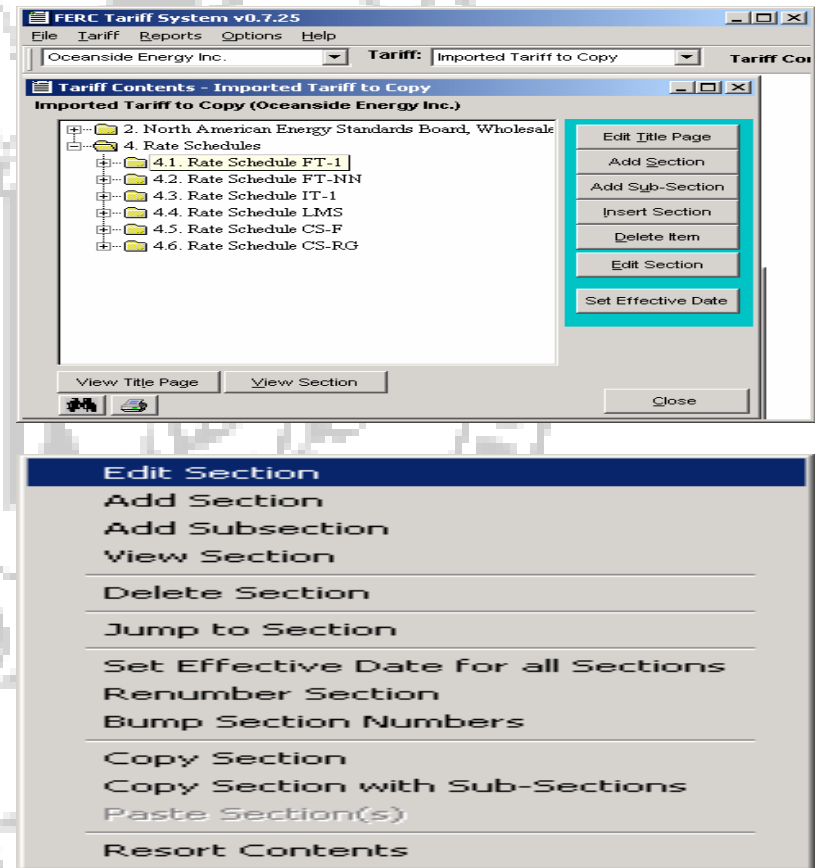
Create Tariff Section - Copy

- **Target paste location, right click, select Paste Section(s)**

- **Choose section level, and paste**

Create Tariff Section - Copy

- **Copied sections now pasted in**

- **Hint: if copying from multiple sources or creating multilevel section revisions, create a working "Tariff", then copy product into Baseline or Revision**
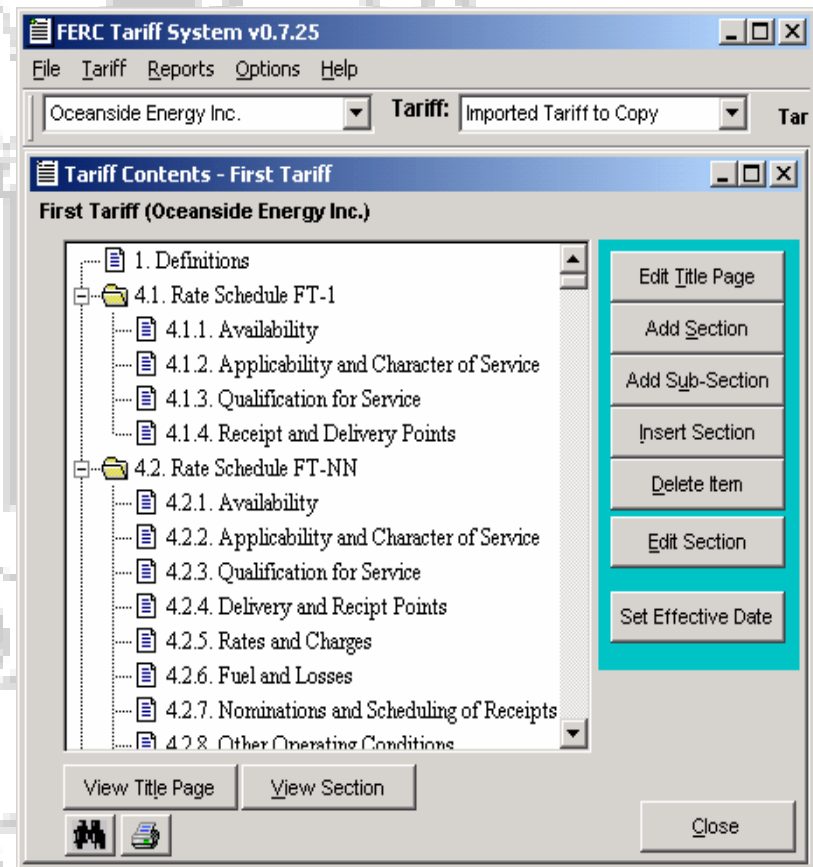
Create Tariff Section - Import

- **Use an extraction macro to create an importable data base. Guidance at** http://www.ferc.gov/docs-filing/etariff/conversion-guide.pdf**.**

- **From File, click "MS Word …Import"**
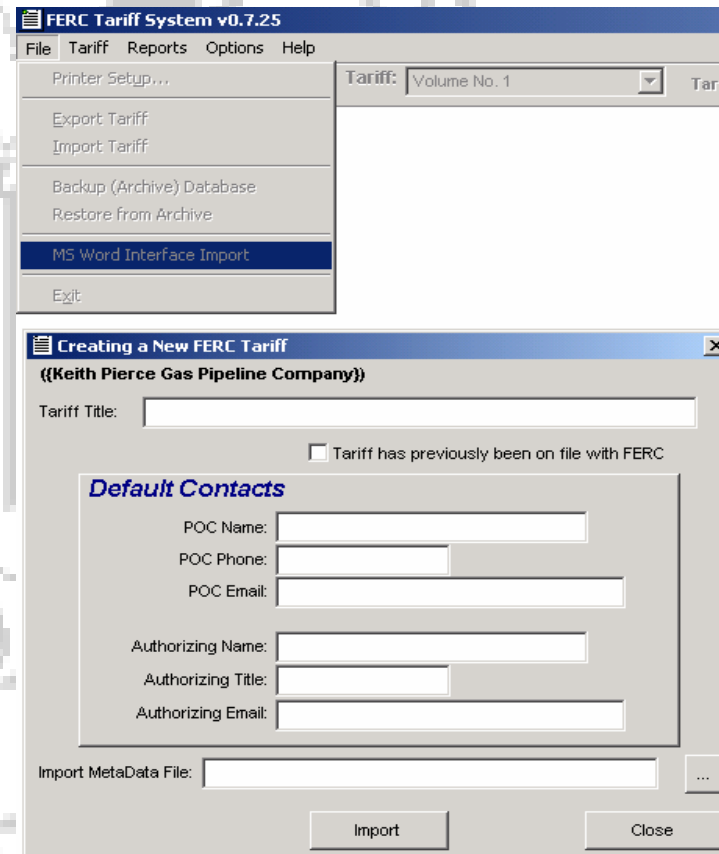
Baseline Tariff

- **Baseline filings are a special case**
  - **Establishes and initializes company's tariff data base**
  - **Commission can only accept or reject whole filing**
  - **No revisions can be made or filed until accepted by the Commission**

Baseline Tariff

- **Special Case**
  - **Enter effective date for all sections at once**
  - **One effective date for all sections only**
  - **This button is only location that Baseline filing effective date can be set**
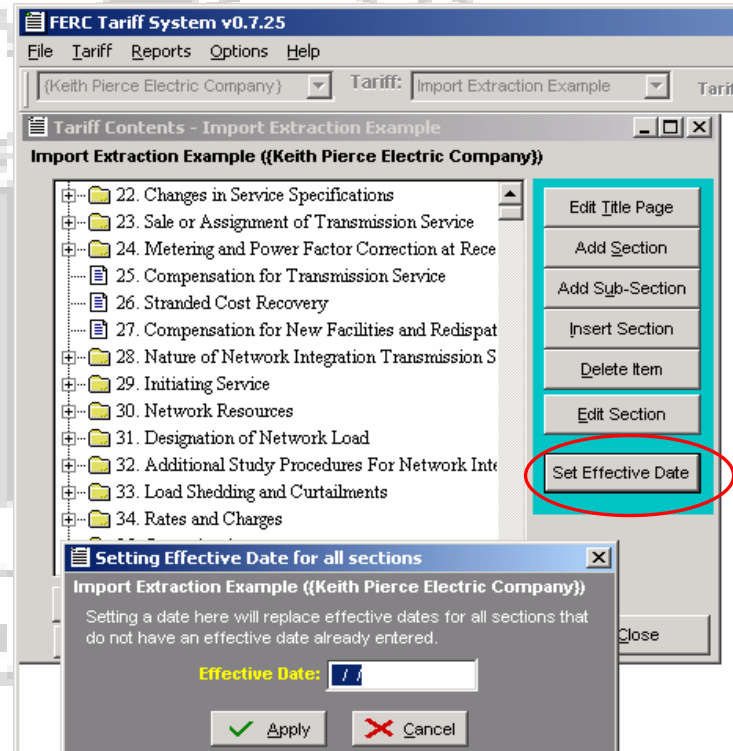
Make a Tariff/Rate Filing

- **Now that the proposed Baseline Tariff is complete, need to file with the Commission**

- **Open <u>Revision/Filing</u>**

Baseline/Revision Filings

- **Tabs of Tariff Revision window basically in order of tariff filing process:**

  Define|Tariff Sections|Req'd Docs|File|Status

Baseline Filing

- **Baseline Tariff Filings Special Case**
  - **No choice of filing types – default choice**
  - **No option to edit tariff sections (go back to Tariff Contents window if need further edits)**

Baseline and Revision Filings

- **For every filing type, <u>required</u> documents are in bold,** optional in standard font

- **If NA or waiver, use quick attach**

Baseline and Revision Filings

- **Set document security level for public viewing**
  - **Attach redacted in required fields, complete as another attachment**

- **View and edit attachments**
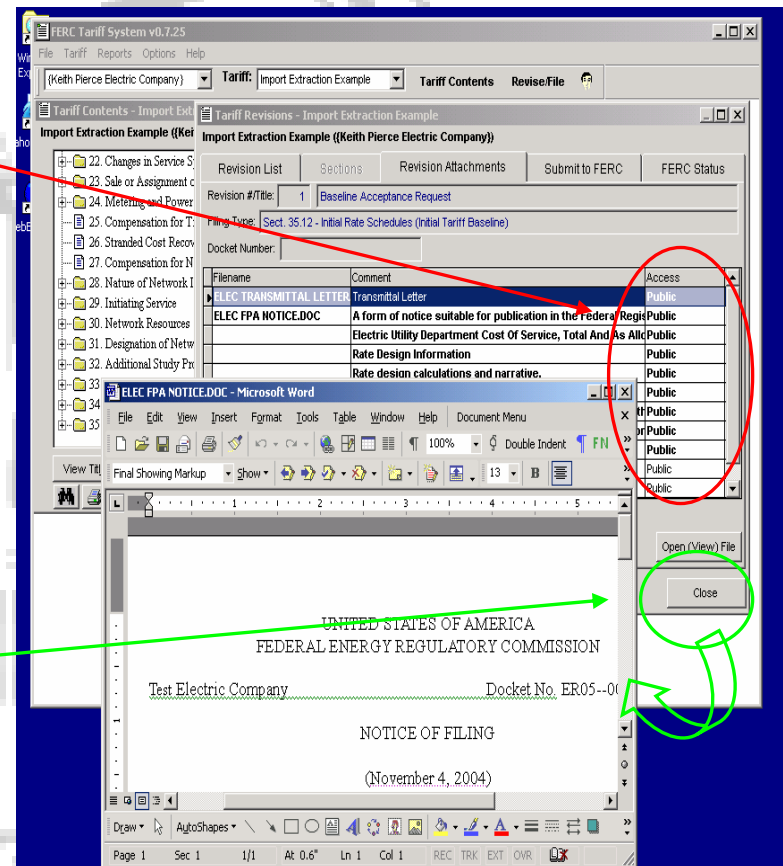
Baseline and Revision Filings

- **Submit to FERC**
  - **Error messages will identify errors that would prevent OSEC from accepting filing**

- **Check FERC Status**
  - **Revision specific**

Revision Filings

- **Unlimited revisions as work in progress**

- **Each revision is a separate "folder" until filed with FERC – not integrated with effective tariff database**

- **Any filing that effects a tariff section status must be made as a "revision"**
  - **Initial proposals under NGA § 4, FPA § 204, ICA § 6, NPGA § 311, PA pursuant to Part 35**
  - **Amendments and compliance filings**
  - **Withdraws**
  - **Motions to move into effect or delay effect**

- **All updates and additional material**

Revision Filings

- **Must define proposed filing before inputting edited tariff sections**

- **Click "New" and select filing type from drop-down menu**

Create Revision Filing

- **After selecting filing type, check other fields:**
  - **Gas program initial filings must indicate motion condition**
  - **Name the filing**
  - **Intra-company comments**
  - **Check for missing data**

- **When finished, click "Create"**

Create Revision Filing

- **Many revisions can be work-in-progress**

- **Alternative section proposals for targeted revision enabled here**

Compliance, Withdraw and Motion Filings

- **Compliance, Withdraw and Motion Filings must identify target revision filed with FERC**
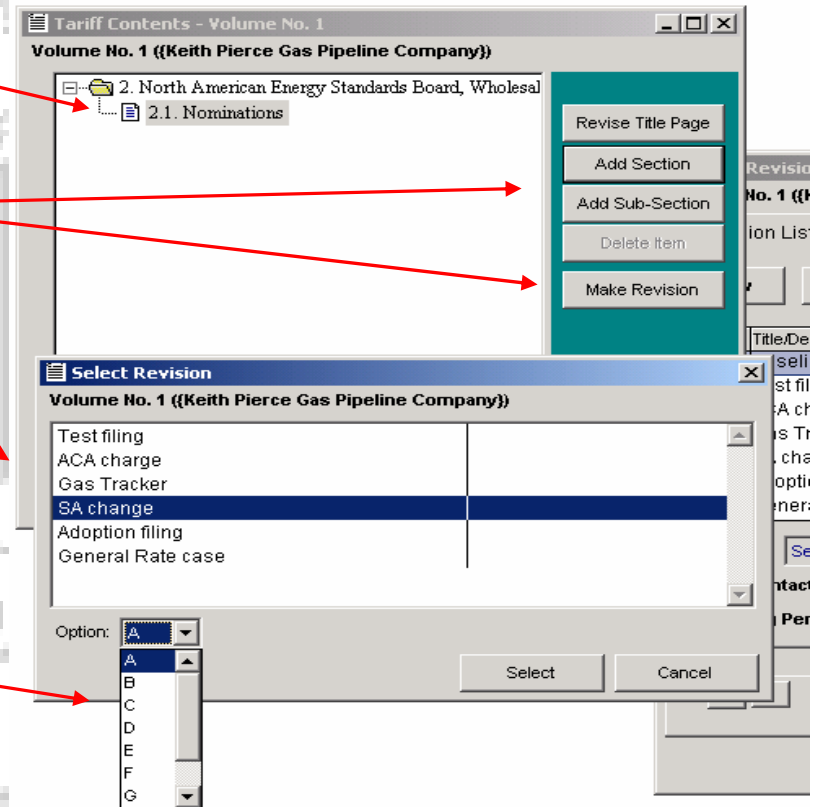
Compliance, Withdraw and Motion Filings

- **Must select sections to include in filing**
- **Compliance filings may include additional revised sections**
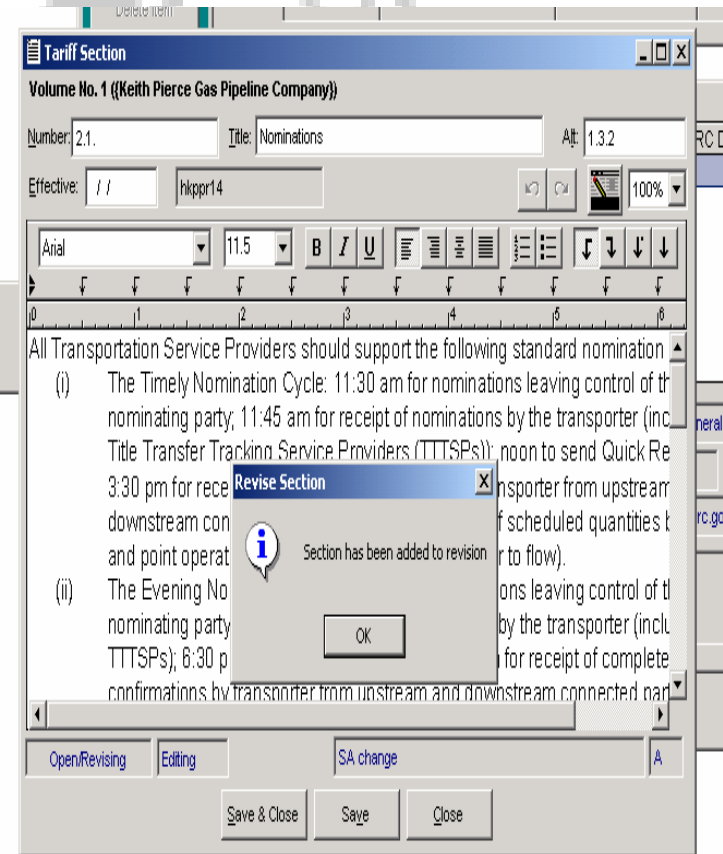- **Withdraw/Motion filings may be section specific**
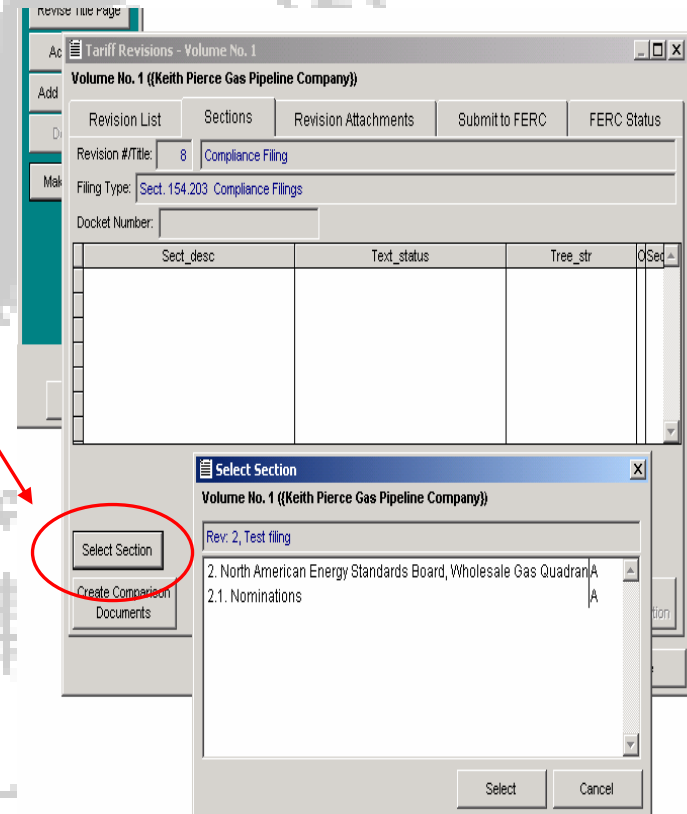
Create Revision Filing

- **Select section to revise, add sections or sub-sections**

- **Choose pre-defined filings-in-progress**

- **Choose alternative if any**

Create Revision Filing

- **The selected section is added to the revision**

- **Can be edited here, or later within the revision filing**

Create Revision Filing

- **Sections can be edited from revision number**

- **Select section**

- **Click "Edit"**

- **Edit**

Revision Filing

- **Submit revision**

Closing Comments

- **eTariff is work-in-progress**
  - **Comments on functionality and user interface invited**
  - **etariff@ferc.gov**
    - **Explain problem and suggested solution**
    - **Include screen shots in an attached document to help explain suggestion/problem**